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ABSTRACT

The booklet outlines Vermont's procedures for identifying learning disabled (LD) students. Following an introduction and a review of definitions of LD, information is presented on the pre-referral process (including the composition and function of the building based support team and procedures for data collection). The eligibility process is addressed in terms of ability and achievement assessment, exclusionary considerations, factors in the decision making process, and the 3 year re-evaluation. A final section focuses on alternatives for ineligible, low achieving children. Among appended information is a learner characteristics checklist. (CL)

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Vermont's Procedures for the Identification of Children with Specific Learning Disabilities

Vermont State Department of Education

EC170894

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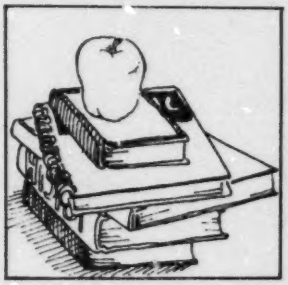
Vermont's Procedures for the Identification of Children with Specific Learning Disabilities

Vermont State Department of Education



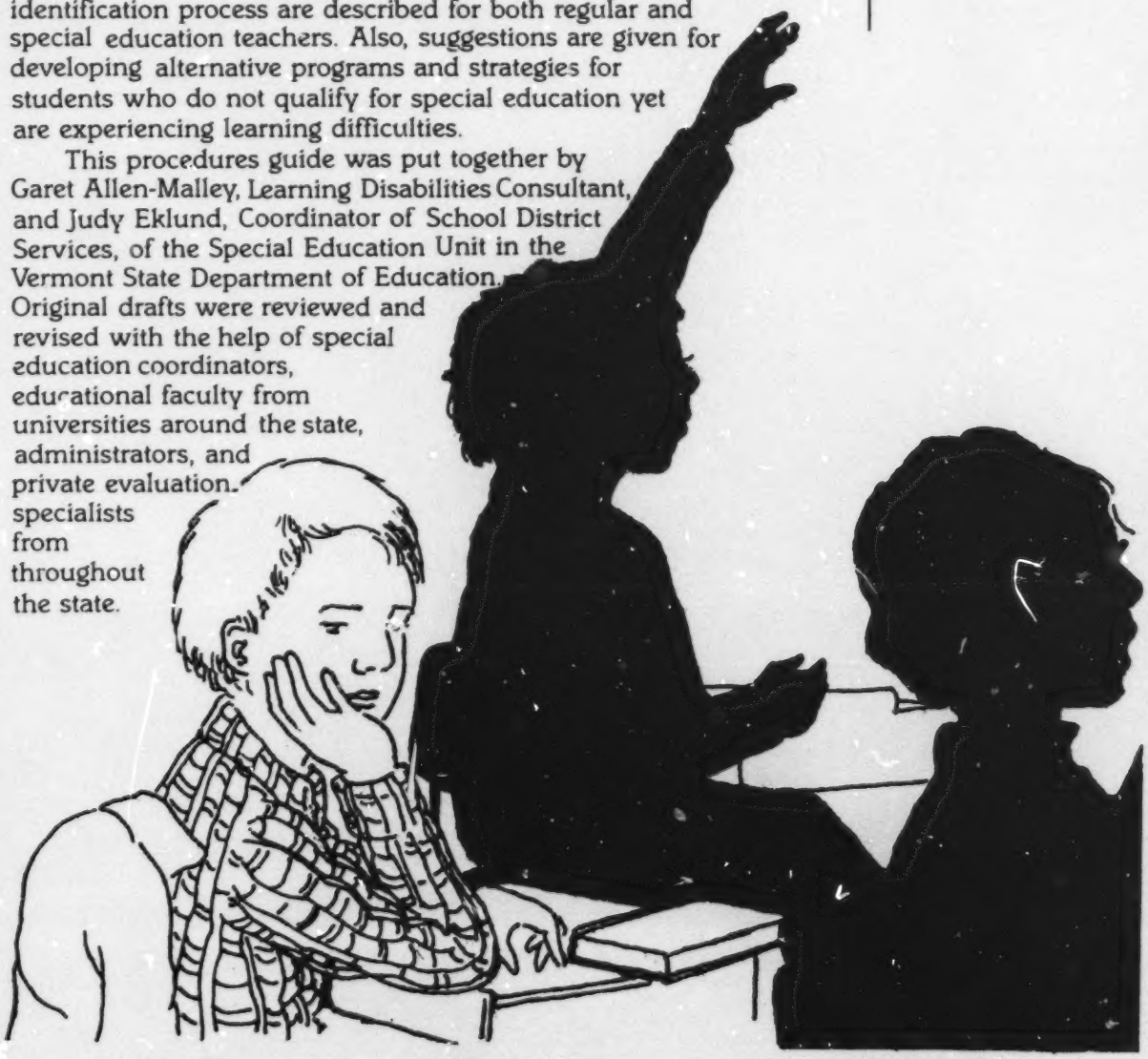
This publication is dedicated to the memory of Jean S. Garvin,
Director of Special Education, Department of Education, 1961-1984.

Introduction

In July 1982, the Vermont State Board of Education adopted revised standards for determining eligibility for special education. Since then, the need for expounding on certain eligibility standards has become increasingly apparent. This publication was prepared in response to that need.

The intent of this publication is to lay out some uniform procedures that can be used in all schools for identifying children with specific learning disabilities. Roles to be fulfilled in the identification process are described for both regular and special education teachers. Also, suggestions are given for developing alternative programs and strategies for students who do not qualify for special education yet are experiencing learning difficulties.

This procedures guide was put together by Garet Allen-Malley, Learning Disabilities Consultant, and Judy Eklund, Coordinator of School District Services, of the Special Education Unit in the Vermont State Department of Education. Original drafts were reviewed and revised with the help of special education coordinators, educational faculty from universities around the state, administrators, and private evaluation specialists from throughout the state.



What are Learning Disabilities?

Under Vermont rule (2362.1 (b)): a specific learning disability is identified as a severe discrepancy between a pupil's ability and his or her achievement in at least one basic skills area. The discrepancy between a student's ability (as measured by an approved test of intellectual ability) and actual achievement (as measured by an approved achievement test) must equal or exceed 1.5 standard deviations using standard scores. The discrepancy shall not be the result of a visual, hearing or motor handicap; mental retardation; emotional disturbance; or environmental, cultural, or economic disadvantage.

Under **federal rules (P.L. 94-142): a specific learning disability means a disorder in one or more of the psychological processes involved in understanding or in using language, spoken or written, which may manifest itself in an imperfect ability to listen, speak, read, write, spell or to do mathematical calculations.** The term includes such conditions as perceptual handicaps, brain injury, minimal brain dysfunction and dyslexia. The term does not include children who have learning problems which are primarily the result of visual, hearing, or motor handicaps; or mental retardation; or of environmental, cultural, or economic disadvantage.

The Pre-referral Process

Where to begin...

In determining the existence of a specific learning disability, federal law 5300.543(b)(6) stipulates that a severe **discrepancy between ability and achievement must exist which is NOT correctable without special education and related services.** State rules also require that students have a documented need for special education programs and services (2362.3).

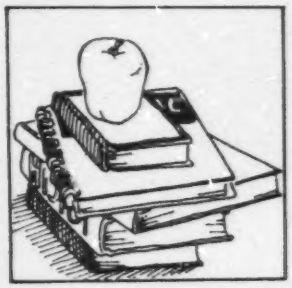
In determining the need for special education under the Vermont rules, **it is necessary to document that programs and techniques available within regular education have been tried, but have not met adequately the student's needs.**

There are numerous students whose school performance for one reason or another does not measure up to expectation. Among these students are those with learning disabilities. **The identification of LD students should begin with an assessment and implementation of various instructional interventions at the student's performance level prior to a complete evaluation.**

This process of trying various interventions should **begin with the classroom teacher bringing his/her concerns about a particular student suspected of having a learning disability to the pre-referral or Building Based Support Team (BBST).** This team would function as an intermediate step between recognition of a problem by a classroom teacher and formal referral for a comprehensive evaluation.

Parental permission is not required to proceed with the pre-referral process. However, it is strongly suggested that the student's classroom teacher inform the parent(s) that there is a concern about the student's academic achievement. This contact allows the classroom teacher to explain the rationale for regular education intervention prior to a comprehensive evaluation, if that becomes necessary. It also provides the opportunity for the classroom teacher to solicit any information from the parents that would be useful.

The Building Based Support Team



Who is on it?

The **Building Based Support Team** composition may vary from school to school. Suggested membership would include:

- the principal
- several experienced classroom teachers who might serve on a rotating basis
- the referring teacher
- the special educator
- the speech/language pathologist if feasible.

The **principal plays a key role** on the BBST. The pre-referral process will require greater involvement and responsibility by regular education personnel in terms of meetings and commitment to the implementation of suggested strategies. **Without the principal's strong support for a collaborative effort between regular and special education, the pre-referral process is unlikely to succeed.**

What does it do?

The mission of the BBST would be to brainstorm intervention strategies with the referring classroom teacher to be used in the regular classroom with a student suspected of having a specific learning disability. These strategies, based on diagnostic information from the classroom teacher, a classroom observation and record review by the learning specialist, and a textbook analysis by the SLP if indicated, would be tried for a set amount of time (four to six weeks). At the end of the time period, the BBST would evaluate the effectiveness of the regular education intervention and decide if the referral should proceed to the Basic Staffing Team.

Why involve the classroom teacher in the pre-referral process?

Involvement of the classroom teacher is very appropriate because the teacher is the person who:

1. is most familiar with classroom curriculum and materials and with demands to be placed on the students;
2. has access to unlimited samples of the student's academic work;
3. sees the child at different times of the day, over many days, and, therefore, has an opportunity to collect observational data on independent and group performance; and
4. is the primary provider for the child's educational needs.

The Pre-referral Process:

How to proceed...

1. Referring classroom teacher contacts BBST leader who sets a meeting date and contacts BBST members.
2. Referring classroom teacher completes:
   - BBST referral form
   - gathers work samples in subject area(s) of difficulty
3. Special educator completes classroom observation and school record review. Speech/language pathologist or special educator, or BBST member completes textbook analysis if appropriate.
4. BBST meets:
   - reviews referral information
   - decides to develop regular education intervention plan or to convene Basic Staffing Team
   - develops and completes regular education plan (see Appendix H)
   - sets time line for intervention in regular education
   - sets next meeting date
5. BBST reconvenes:
   - reviews effectiveness of intervention
   - determines next step — either continue with plan or convene Basis Staffing Team

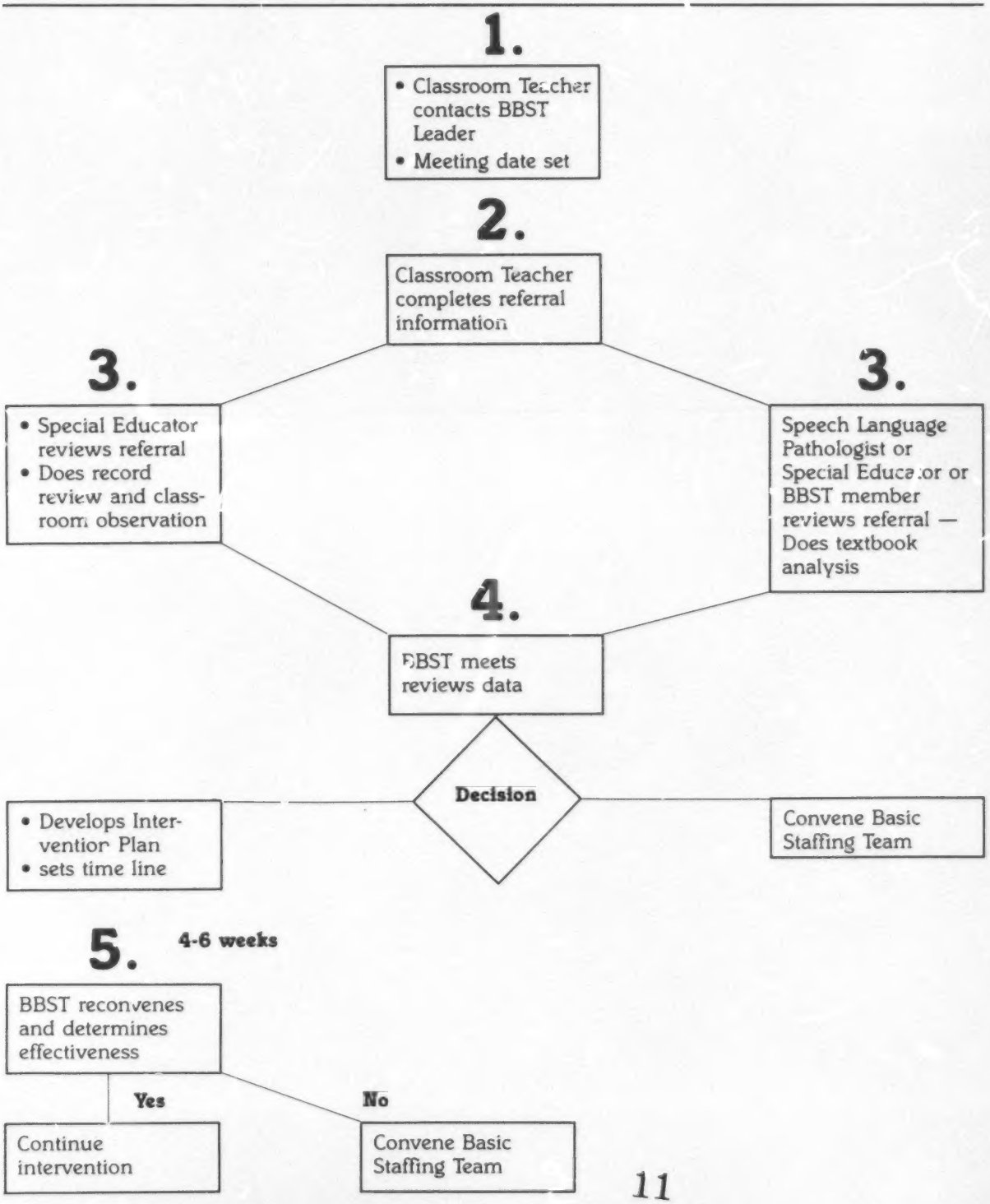
(see chart on page 8)

Why use a pre-referral approach?

Involvement of a pre-referral team is appropriate because it:

1. provides a more efficient and effective means of assisting classroom teachers and students;
2. provides moral and peer support to teachers;
3. provides a vehicle for the faculty to share their expertise in dealing with a variety of learning and behavioral problems;
4. provides teachers with learning/teaching experience that can become a permanent part of their repertoire in dealing with learning problems that will arise in the future;
5. reduces the number of inappropriate referrals; and
6. utilizes special education personnel more effectively.

PRE-REFERRAL BUILDING BASED SUPPORT TEAM PROCESS



Data Collection:

In order for the BBST to develop a regular education intervention plan or to make the decision to refer immediately to the Basic Staffing Team, a variety of data must be gathered relevant to the student s learning difficulties. The following areas are recommended sources for this data collection. The appendix contains suggested forms that have been developed for this part of the pre-referral process.

Pre-referral Forms

The information the classroom teacher provides at the pre-referral stage is crucial in the development of an intervention plan and will be useful later if an evaluation plan is necessary. The suggested form which is provided (Appendix A) is intended as **an in-depth look at the elementary student's classroom environment and how the student functions on a daily basis within the expectations of that environment.**

The course description and student inventory forms provided in Appendix B (Reigel, 1981) are intended for use with the intermediate and secondary student who is experiencing learning difficulties. This information will assist the BBST in developing a regular education intervention plan.

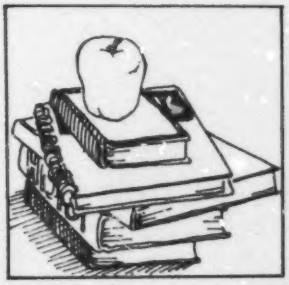
Work Products:

Certain aspects of a student's learning characteristics may become apparent following examination of daily work products. For example:

- **Fine motor skills can be assessed** through such tasks as copying letters, numerals, and drawing figures for art.
- Work sheets may reveal whether a student was **able to correctly follow written directions.**
- **Difficulty in visually organizing written work** would be apparent on a math or written expression paper.
- Consistent **reversals of numbers, letters, patterns of spelling errors, difficulties with punctuation, and lack of sentence sense** would also be apparent from samples of written work.
- A sequential sample of work products may also pinpoint when the student began to experience difficulty.

School Record Review

The information gathered at this step of the pre-referral process is intended to **give the special educator an historical perspective of the student's school career.** This review would be especially valuable for students transferring from another school. Information gathered at this step can be used later in developing an evaluation plan (Appendix D).



Focused Classroom Observation:

The purpose of this observation is to **provide information about the student's performance in the classroom in the area of suspected difficulty**. This means that if the teacher has referred the student because of difficulty in reading, the observation would take place during a reading class as opposed to a math class or gym period. This observation must be done by someone other than the student's classroom teacher.

The following areas should be considered as part of a **classroom observation** (see Appendix C):

1. classroom environment
2. instructional situation
3. student behavior
4. summary of observation

Textbook Analysis:

This step can be done by the speech/language pathologist, the special educator or a BBST member. The purpose of this analysis of the pertinent text(s) is **to determine if the language of direction and/or instruction or the text format could be hampering the student's skill acquisition** (see Appendix E).

Learner Characteristic Checklist:

This document (Appendix F) is to be used by the special educator during the initial BBST team meeting. If the classroom teacher indicates on the referral form that reading and written expression are problems, the special educator could use those areas of the checklist **to help isolate the specific areas of difficulty.** The information gathered at this point will be helpful in developing an intervention plan.

Initial Building Based Support Team Meeting:

The purpose of this initial meeting of the BBST is twofold:

1. **to review the data that has been collected on the student,**
2. **make the decision either to implement a regular education intervention plan for four to six weeks or make a referral directly to the Basic Staffing Team.**

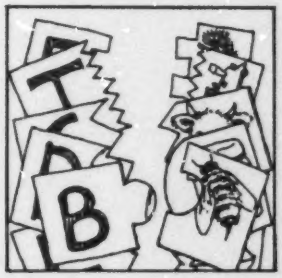
If the decision is to develop a regular education intervention plan, specific strategies are identified. Dates for initiation and outcomes are stated. It is critical to set a time line for this intervention. Reassessment by the team in four to six weeks must be done to insure that valuable time is not wasted if the intervention plan is unsuccessful. If the team

determines the intervention plan has been successful, the plan should continue to be carried out. A suggested form for developing an intervention plan has been included (see Appendix H).

If the BBST team makes the determination that the regular education intervention plan developed at the pre-referral stage has not been effective, then a formal referral is made to the Basic Staffing Team. At this point, the process follows the procedures outlined in the Vermont rules.

Information gathered to this point, i.e., classroom observation, medical data, current life circumstances, can be incorporated into the formal evaluation procedures which are addressed in the following chapters.

The Eligibility Process



How does one determine ability and achievement?

Since the key principle underlying the current definition of learning disabilities is that of a severe discrepancy between a student's ability level and his or her academic achievement, the purpose of this chapter is to highlight definitions and considerations related to the assessment of ability and achievement.

Assessing Ability:

Definition

Ability level is defined as **a person's general overall ability to adapt and function in the learning environment.** Ability level includes not only the student's cognitive abilities and adaptive behaviors displayed in school, home and social relationships, but also his or her general intellectual ability as measured by individually administered tests of cognitive ability.

Considerations in the Assessment of Ability

The primary goal of the Basic Staffing Team is to compile a reasonable representation of a student's level of performance in a wide range of cognitive and adaptive areas to determine his or her level of ability.

The determination of ability level requires that the Basic Staffing Team first review all the information regarding the individual's cognitive functioning and then arrive at a decision regarding ability level. In addition to looking at global IQ scores, the Basic Staffing Team should consider the pattern of data that provides the most consistent evidence to support their decision. **Estimating ability level from one specific skill or trait is inappropriate.** This is true with both subjective information and objective test data. As David Wechsler noted in his manual (1974), "...the examiner should never estimate or infer a child's cognitive ability from his scaled score on a single test."

It is recommended that the determination of ability consider procedures which:

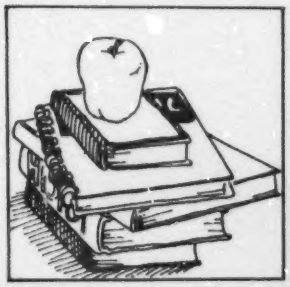
1. consider the influences of social, cultural and educational factors,
2. regroup subtests in specified ways to analyze more carefully a student's intellectual strengths and weaknesses (e.g., Kaufman and Bannatyne procedures), and
3. verify test results in the use of additional formal and informal tests and observation procedures.

Supporting Diagnostic Strategies:

1. Achievement Tests

Although achievement tests have been traditionally thought of by some as being separate from ability tests and/or aptitude or intelligence tests (Cronbach), there is some evidence to suggest the contrary. **Sattler (1982) lists studies that have compared some intelligence tests with achievement tests showing many high correlations.** It is believed that by **analyzing information from individually administered achievement tests, one can often gain some insight into an individual's ability level.** For example, it is common among SLD students that they score within the average range in mathematics, while scoring significantly below age and grade expectancies in reading and written language. This would suggest that a student under consideration may have at least average ability for learning mathematics since it is theoretically not possible to score above one's innate potential.

It is also beneficial to **consider the information received from achievement tests which provide measures of general information and knowledge.** Learning disabled students frequently perform above their academic achievement levels on measures of general knowledge and information. Presumably, this is due to their relatively good cognitive abilities which permit them to learn incidentally good amounts of general information and knowledge, which is in direct contrast to their learning in more formal achievement areas. Individual achievement tests which may provide information regarding ability level include the **Peabody Individualized Achievement Test** and the **Knowledge Clusters from Woodcock-Johnson Psycho-educational Battery.** Such information obtained from achievement tests would only be used to support the Basic Staffing Team's determination regarding ability level. It would not be appropriate to substitute achievement test scores for traditional ability measures.



2. Adaptive Behavior Scales

Adaptive behavior scales provide an additional perspective from which to view one's ability level since they **present an indication of the effective use one is making of his/her ability level.** Adaptive behavior scales measure such attributes as self-help skills, communication skills, personal self-direction and motivation, social skills, personal initiative and independence, peer and community relations, and nonacademic school roles. Generally, SLD students demonstrate age appropriate adaptive behavior skills.

3. Observation Techniques

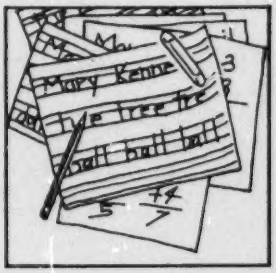
Observing a student in the classroom and in more unstructured situations may provide indications of ability level. A focused observation may be of most value for determining ability when it includes the following dimensions:

1. **Attention skills:** One might consider task orientation variables (i.e., to what is the student attending) and possible causes of inattention, if present.
2. **Verbal abilities:** Note listening comprehension and expressive abilities.
3. **Problem solving strategies:** Try to determine the student's approach to tasks, speed of decision making and responses, persistence with tasks, task completion, motivation, etc.
4. **Social behavior:** Observe the student's behavior and social strategies with both peers and adults in structured and unstructured settings.

Assessing Achievement:

Definition

Achievement is defined as **the student's skill development in academic content areas.** The seven achievement areas include the following:

1. **Oral expression** is the ability to express oneself utilizing vocal speech and language. This includes phonology, morphology, syntax and semantics. While many combinations of oral expression problems may occur, the primary characteristic of an expression deficit is the student's

inability to formulate and use age appropriate spoken language. If a student is suspected of having a specific disability in this area, a speech/language pathologist should be involved in the evaluation.

2. **Listening comprehension** is the auditory ability to understand spoken language at a level that is age appropriate.

3. **Basic reading skills** are defined as those fundamental reading skills and strategies required for identifying clues significant for deriving meaning from written text and for attaining comprehension skills. This area includes such items as word recognition skills, phonic and structural analysis skills, reading rate and fluency, and the use of context clues.

4. **Reading comprehension** includes three levels of performance:

- **Literal:** outlining, paraphrasing or summarizing the ideas expressed by the author.
- **Interpretive:** identifying cause and effect relationships, detecting the main idea, drawing conclusions.
- **Critical:** judging accuracy, distinguishing between fact and opinion, and using analysis skills more thoroughly.

5. **Written expression** includes competency in the following areas:

- **Mechanical:** to form letters, words, numerals and sentences in a legible manner.
- **Productive:** to generate enough meaningful sentences to express one's thoughts, feelings, and opinions adequately.
- **Conventional:** to write in compliance with accepted standards of style, especially those governing punctuation, capitalization format and spelling.
- **Linguistic:** to use acceptable English syntactic, morphological and semantic elements.
- **Cognitive:** to express ideas, opinions and thought in a creative and organized way, including writing at an expected level of abstraction.

6. **Mathematics calculation** includes those processes and strategies by which one shows an understanding of the means to reach an arithmetic computation solution. Such strategies include the rote manipulation of objects, sets, numbers and patterns in order to reach an appropriate solution.

7. **Mathematics reasoning** refers to mathematics problem solving in a broad sense (Kennedy, 1980). Some of the steps in a problem solution include:

a. recognition of the nature of the problem;
b. noting similarities and dissimilarities to previously experienced problems;

c. selecting appropriate procedures for problem solving; and
d. performance of operations.

Considerations in Assessing Achievement

Assessment of individual achievement is one component of a system of services, not an isolated activity. **Beginning with initial screening and identification phases and on through the annual IEP review, assessment of achievement is a continuous process.** It is recommended that formal evaluation instruments be used for the initial determination of eligibility since they provide standard scores or percentile ranks that allow for comparison of ability and achievement. Information from informal tests and other sources (teacher information, work samples, etc) should be viewed as valuable supportive documentation.

Although only one area of achievement need be discrepant with the student's ability in order for a diagnosis to be further considered, the seven achievement areas seldom appear in isolation. Lack of basic reading skills may also indicate a similar weakness in reading comprehension. The relationship between calculation and reasoning in mathemetics is often an equally serious problem for a learning disabled student. It is, therefore, wise for the Basic Staffing Team to consider as many related areas as possible when addressing referral concerns.

It is not always essential to formally evaluate all seven areas of achievement. While it is important that the Basic Staffing Team has adequate information on all seven areas, formal test information in each area is not necessary. For example, if there is adequate teacher information (work samples, grades, etc.) that a student is performing well in all areas of mathematics, mathematics need not be evaluated formally. **Formal testing should only be initiated in the areas where the student is exhibiting ongoing difficulty.** When developing the evaluation plan, the Basic Staffing Team should refer to the Accepted List of Tests for Special Education Eligibility.

Severe Discrepancy:

By definition under both state and federal regulations, the determination of learning disabilities requires that Basic Staffing Teams document the existence of a severe discrepancy between aptitude and achievement.

Identification of a severe discrepancy continues to be a difficult judgement for Basic Staffing Teams since the theoretical basis for describing the discrepancy must be found outside a strict mathematical formula.

The purpose of this section is to provide Basic Staffing Teams with an operational framework for documenting the existence of a severe discrepancy that is statistically significant and has educational significance as well.

Two statistical factors are primarily important: the phenomenon called regression toward the mean and test error.

Regression Toward the Mean:

It is strongly recommended that the Basic Staffing Team consider the regression phenomenon when determining severe discrepancy. Since IQ tests and achievement tests are not perfectly correlated, the predicted value of the achievement score will regress toward the mean (McLeod). This regression effect is particularly true when the IQ scores are farther from the mean.

For example, if a subject obtains a standard score of 130 on an IQ test, it is inappropriate to expect that his or her achievement score should also be equal to 130. Futhermore, a subject who obtains an IQ of 80 will often score higher than that score on an achievement test, suggesting that he or she is an overachiever when in reality the higher achievement score is due to the regression phenomenon.

Table 1 illustrates the regression effect. IQ scores obtained on commonly used tests can be converted to expected achievement scores:

EXAMPLE:

Obtained WISC -R Full Scale IQ = 130
Expected Achievement Score = 118

To determine the degree of discrepancy, the expected achievement score is compared to the actual score:

EXAMPLE:

Expected Achievement Score = 118
Actual Achievement Score = 90
28

The discrepancy of 28 standard score points exceeds Vermont's 22 point criteria.

As we can see from Table 1, **the lower the correlation between ability test and achievement test, the greater the regression effect.** As a result, it may be unrealistic to expect any student's achievement scores to be at the same level as his or her cognitive ability simply due to statistical factors. Consideration of regression in computing severe discrepancy will provide the Basic Staffing Team with a more accurate indication of whether or not a discrepancy exists.

TABLE 1
REGRESSED SCORED FOR DETERMINING A DISCREPANCY BETWEEN IQ AND ACHIEVEMENT

Gary L. Heaser, Ph.D. Consultant for the Learning Disabled Special Education Division Macomb Intermediate School District

Correlation Between IQ and Achievement

Obtained or Estimated IQ Score	.7[a]	.6[b]	.5[c]
130	121	118	115
129	120	117	115
128	120	117	114
127	119	116	114
126	118	116	113
125	118	115	113
124	117	114	112
123	116	114	112
122	115	113	111
121	115	113	111
120	114	112	110
119	113	111	110
118	113	111	109
117	112	110	109
116	111	110	108
115	111	109	108
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81	87	89	91
80	86	88	90
79	85	87	90
78	85	87	89
77	84	86	89
76	83	86	88
75	83	85	88
74	82	84	87
73	81	84	87
72	80	83	86
71	80	83	86
70	79	82	85

(Use of regressed scores with these clusters is necessary only when the clusters are compared to achievement tests other than from the W-J, since the Achievement-Aptitude Profile automatically regresses the scores.)

a. W-J Rdg. Apt. cluster
W-J Math. Apt. cluster
W-J Written Lang. Apt. cluster

b. WISC-R VIQ & FSIQ
WAIS-R VIQ & FSIQ
WPPSI VIQ & FSIQ

c. WISC-2 PIQ
WAIS-2 PIQ
WPPSI PIQ
McCarthy GCI
TONI
K-ABC

Test Error:

Another statistical factor to consider is test error. All scores obtained from tests are merely estimates of one's "true" score. That is, **due to test error, there is always some difference between an individual's "true" score and his/her obtained score.**

The degree of deviation due to error for an obtained score is represented by its "standard error of measurement". The standard error of measurement establishes a zone of confidence within which a true score falls approximately 68% of the time. For example, the standard error of measurement for the Full Scale IQ of the WISC-R is three IQ points. Therefore, if one obtains a Full Scale IQ of 94, there is a 68% chance that the person's true score falls within the IQ range of 91-97.

The problem of test error is compounded when one compares the scores from two different tests. Test error becomes greater when two tests which are not perfectly reliable are compared (Salvia and Ysseldyke). While all tests are not perfectly reliable and test error cannot be removed, both can be minimized. The best single approach is to use reliable tests. With respect to reliability, Ysseldyke recommends that for individual diagnosis, tests that have a reliability of .9 or above should be used.

"Due to test error, there is always some difference between an individual's "true" score and his/her obtained score."

Qualitative Factors:

The identification of a learning disability cannot be accomplished through the sole use of statistical procedures. Determination of eligibility and need for special education requires the application of careful clinical judgement by members of the Basic Staffing Team. **Additional qualitative data which describes the learner characteristics of the student must be considered** in the identification of SLD children. Also, standardized test results may be interpreted qualitatively to provide information about a student's learning abilities. The following types of qualitative data should be considered by Basic Staffing Teams when documenting a severe discrepancy.

Verbal Versus Non-verbal Functions

Discrepancies between verbal and non-verbal functioning, such as may be apparent when comparing Wechsler Verbal IQ and Performance IQ scores or measures of language and perceptual functioning, have been associated with specific learning disabilities. Often the question arises as to which IQ score should be used when determining a discrepancy. Different opinions exist among professionals in the field on this topic.

Kaufman cautions professionals in putting much weight on a Verbal-Performance discrepancy since research has demonstrated that children without learning problems also have been shown to have such discrepancies. It is not unusual for non-handicapped children to have differences of 15 points on the Verbal-Performance Scales. It is clear that this factor should be considered within the entire context of the evaluation.

Since the Full Scale IQ is the most reliable of the three IQ scores, it should be used for purposes of determining a severe discrepancy. A guideline that the Basic Staffing Team may use is that unless the Verbal-Performance discrepancy is greater than 15 points, the Full Scale IQ will be routinely used.

There may be occasions when the Basic Staffing Team determines that one particular scale is a better indicator of the student's ability. For example, in cases where the Basic Staffing Team suspects that verbal processing difficulties have significantly depressed the student's performance on the Full Scale IQ, they may choose to use the Performance IQ score when determining severe discrepancy. In such cases, additional supporting evidence must be provided by the speech language pathologist. **The Basic Staffing Team must also document in its comprehensive evaluation report the rationale for not using the Full Scale score.**

Receptive Versus Expressive Functioning

Specific learning disabilities have been associated with weaknesses in processing either receptive or expressive information. Discrepancies between performances on measures of expressive language or non-language functioning and receptive measures of these processes may be interpreted qualitatively by the Basic Staffing Team. Learner characteristics that are indicative of learning disabilities in this area should be documented.

Visual Processing

Visual processing disorders, such as might be apparent from motor or non-motor measures of perception, may be indicative of specific learning disabilities. Results from such measures must be interpreted within the context of the student's age and level of intellectual ability since both factors influence perceptual ability.

Auditory Processing

Auditory processing deficits, such as might appear on measures of auditory reception or discrimination, have been associated with specific learning disabilities. Since auditory processing is related to developmental age and cognitive ability levels, deficits should be interpreted in relation to such information.

Cautions in Evaluating Central Processing Abilities

It is one professional orientation in the field of learning disabilities that SLD students exhibit deficits in processing abilities. However, the field has not been able to agree on a single theoretical base of information and, as a result, there are many theories, but no one theory has been commonly accepted as the theory. Also, assessment procedures currently available in this area lack adequate reliability and validity. **Given these circumstances, the criteria for identifying learning**

disabilities does not require the Basic Staffing Team to document that a processing disorder exists. At best, information in this area may be helpful when designing instructional plans for SLD students.

Educational Significance

The existence of a statistically significant severe discrepancy, by itself, is not sufficient to certify a student eligible as "learning disabled". The Basic Staffing Team must also determine that the discrepancy has educational significance. The primary issue here to be considered is whether or not the student is in need of special education. For example, a student who exhibits a severe discrepancy which is determined to be statistically significant, but whose achievement is within normal limits for his or her grade, may not be in need of special education. Other factors that the Basic Staffing Team should consider when determining whether a student is in need of special education:

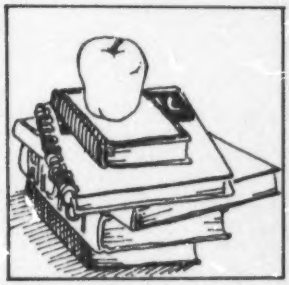
1. **Has the student had adequate educational opportunity?** Consider absenteeism, frequent moves.
2. **Have regular education services been exhausted including remedial or supplemental services, when available?** Have regular education services been found to be unsuccessful?
3. **Have other handicaps been ruled out as not the primary cause of the discrepancy?**

Special Considerations for Young Children

Application of the discrepancy formula may be inappropriate for children under age eight due to limitations of current test instruments. There should be cautious interpretation of the scores resulting from standardized tests of aptitude and achievement when making eligibility decisions for children in the primary grades.

Although classroom performance and work samples should be taken into consideration for all suspected SLD children, more weight should be given to these variables when considering young school aged children. Diagnostic activities include:

- Direct observation of classroom behavior
- Comparison of child with other class members
- Observation of attention skills
- Observation of ability for independent work
- Observation of problem solving strategies
- Observation of child's compensatory abilities
- Observation of discrepancies between child characteristics and curriculum requirements
- Recommendations for adjustments within the regular classroom



Since children at the preschool level often have not had the opportunity to demonstrate school achievement, determination of an ability/achievement discrepancy is a difficult judgement for the Basic Staffing Team. The question becomes one of predicting which children will later demonstrate a specific learning disability once presented with the opportunity to attain the basic skills such as reading, writing, etc.

Although the Essential Early Education standards apply developmental criteria for eligibility determination, Basic Staffing Teams must also assign a handicapping condition for the federally required Child Count. **For preschool children, the Basic Staffing Team should consider carefully those learning readiness skills necessary for later achievement in academic areas.** Examples include:

- auditory and visual discrimination
- gross and fine motor coordination
- memory
- attention to task
- expressive and receptive language

At best, if a preschooler exhibits severe deficits in any of the above areas and appears to have average cognitive ability, he or she may be considered at risk for specific learning disabilities.

Also of importance when considering very young children is the extent of their previous or current participation in a preschool program, including:

1. developmental gains made while in the program,
2. preschool teacher's information and recommendations, and
3. their rate of learning.

The kinds of learning opportunities and experiences young children have had at home may provide an additional source of information.

Exclusionary Considerations:

Not all children and youth who demonstrate a severe discrepancy between ability and achievement should be labeled as learning disabled. It is possible that a student's performance and production in the classroom are not equal to his or her ability level due to factors other than a learning disability.

P.L. 94-142 has carefully specified a set of exclusionary criteria that must be addressed prior to identifying a student as learning disabled.

Section 121a.541(b) states:
The team may not identify a child as having a specific learning

disability if the severe discrepancy between ability and achievement is primarily the result of:

1. a visual, hearing or motor handicap,
2. mental retardation;
3. emotional disturbance; or
4. environmental, cultural or economic disadvantage.

Differentiating Factors

In ruling out the exclusionary criteria as the primary cause of a severe discrepancy, the Basic Staffing Team should answer the questions below for each area. In determining the primary handicap, the team must consider the most dominant characteristics the student presents.

Learning Impairment

1. **Has the student been given an individually administered test of ability?** If the student's overall ability level is 1.5 to 2 standard deviation below the mean, learning disabilities would not be considered the primary cause of learning difficulties.

2. **Has an individual assessment of adaptive behavior been administered?** Learning impaired students typically exhibit deficits in adaptive behavior skills.

3. **Has the student had an assessment of school performance?** This must include formal achievement testing as well as a review of the student's educational history. It is to be expected that both learning impaired and learning disabled students will have depressed academic scores. However, a learning impaired student's performance is more closely in line with his or her assessed intellectual ability, while the learning disabled student's is not.

Emotional Disturbance

The differentiation between learning disabilities and emotional disturbance is often a difficult decision for Basic Staffing Teams. Especially in mild to moderate areas of these two handicaps, the lines of difference become less clear. Often adolescents may exhibit characteristics which could be considered valid for both areas.

The Basic Staffing Team must address:

a. which handicap came first, and
b. which is the primary problem requiring special education?

A thorough analysis of the student's school history will give information indicating if learning disabilities or behavioral problems were first evident in school. If the academic discrepancy appears to be caused by the existing emotional problems, emotional disturbance should be considered as the primary handicap. If the emotional problems appear to be caused by the student's existing learning difficulties, a learning disability should be considered as the primary handicap.

Environmental, Cultural or Economic Factors

Some students who are performing poorly in school and who do not exhibit characteristics of other handicaps may be experiencing learning difficulties due to external factors. Identifying to what degree the severe discrepancy is attributed to environmental, cultural or economic factors is not easy. Care should be given when excluding a student on these bases. Only the most limited circumstances can be acknowledged as being the primary cause for a student's severe discrepancy. Such general circumstances might include areas like erratic school attendance, frequent moving from one home to another, poor educational stimulation in previous school settings, family disorganization or different cultural values and priorities.

Questions to address:

1. Do attendance patterns show that the student has changed schools so often, or has not attended school enough, that normal achievement gains were not possible?
2. Have there been any significant traumatic events in the student's life prior to the student exhibiting learning problems?
3. Does the student come from a family whose English is not the predominant language used, and does this language difference severely affect the student's progress in school?
4. If the student is economically disadvantaged, have Chapter 1 remedial programs been tried?

Sensory and Motor Handicaps

1. **Has the student passed the school vision screening examination?** If no, has the student had an ophthalmologic and/or optometric exam? Has the student had any medical history of eye disorder affecting visual acuity?

2. **Has the student passed the school hearing screening?** If no, has the student had audiological testing? Has the student had any medical history of ear disorders affecting hearing?

3. **Has the student passed the school motor screening given by the school's physical education staff?** If an area of concern, has the student been evaluated by a physical and/or occupational therapist? Has the student had a neurology exam?

Other Factors to Consider

1. **Is the student's motivation to learn adequate?** The overriding concern here is that students not be classified as SLD if their performance is due to a lack of interest in school. Poorly motivated students otherwise capable of learning and performing up to their ability level frequently do not do so because of extraneous factors which diminish motivation, e.g., insufficient challenge at school, personal problems, indifferent or inflexible teaching styles. **A thorough analysis of the student's school history should help to distinguish whether motivational problems are the primary cause of learning difficulties or a secondary characteristic of specific learning disabilities.**

2. **Could the student be classified as a slow learner?** Some students who are having difficulties in school and do not meet other exclusionary criteria may not be identified as learning disabled due to a limited degree of discrepancy between ability and achievement. For these students whose measured ability is typically in the low average range, actual achievement in many cases is close to their cognitive ability level. Therefore, these students whose poor performance in school can be explained by their less than average ability, would not be eligible for special education services.

Considerations in the Decision Making Process:

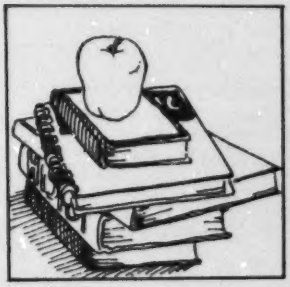
The crux of the process described in these guidelines comes when the Basic Staffing Team makes the decision that a child is or is not eligible for a program for specific learning disabilities. Of special concern here is the decision making process used by the team.

Evaluation Data:

The identification of specific learning disabilities cannot be accomplished through the use of strictly quantified procedures. Instead, determination of eligibility and need for specific learning disabilities services require the application of careful clinical judgement by members of the Basic Staffing Team. In making this determination, Basic Staffing Team members must first consider all the data collected during the comprehensive evaluation, including discrepancy scores, as derived through the application of the discrepancy formula, and specific exclusionary criteria which may indicate ineligibility for specific learning disabilities services. In addition to this information, Basic Staffing Team members must consider other data such as the following characteristics:

- social and educational characteristics
- medical indicators
- qualitative performance on standardized tests
- considerations related to preschool and primary aged children

Another important consideration of the Basic Staffing Team in determining eligibility is the discrepancy score limitations, including measurement artifacts and errors.



Interpretation of Data:

Once the data has been collected and reviewed, Basic Staffing Team members must interpret and evaluate this data to determine whether or not a severe discrepancy exists between intellectual ability and achievement and whether this discrepancy is due to a specific learning disability. During the deliberation process, answers to these questions may assist in the interpretation of data:

- Are the onset and duration of the characteristics indicative of specific learning disabilities?
- Are the characteristics relevant to SLD identification?
- Does most of the data seem consistent with the SLD diagnosis?
- Are the characteristics severe enough to warrant SLD identification?

The following describe each of these decision points in greater detail.

Onset and Duration of Characteristics:

The Basic Staffing Team must evaluate the identified characteristics to determine when they were first noted and whether they have been present for some time. **Since many other conditions may be mistaken for specific learning disabilities, careful attention to the onset and duration of the pertinent characteristics is essential.** Characteristics which are indicative of specific learning disabilities would be expected to:

- have begun in conjunction with the start of school or other specific academic demands, rather than in response to more general environmental stressors;
- have been present for a period of time regardless of general health or attempted interventions.

Relevance of Characteristics:

The Basic Staffing Team must evaluate the data to determine whether observed characteristics are indicative of specific learning disabilities for the individaul in question. In determining whether the identified characteristics are relevant to specific learning disabilities, Basic Staffing Team members should consider both the number and the severity of these characteristics.

Consistency of Data:

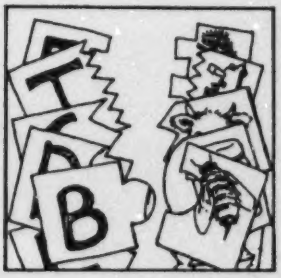
Demonstration of a small number of characteristics which have been associated with specific learning disabilities in some children does not necessarily signal the presence of specific learning disabilities. However,

if a given child demonstrates a number of positive indicators, the Basic Staffing Team members may feel more certain of the SLD identification.

If diverse data sources produce evidence of a specific learning disability, this would seem to be a clearer indicator of SLD eligibility than a small number of isolated characteristics.

Development of Team Report:

As specified in the Vermont rules, the Basic Staffing Team must prepare a written evaluation report which indicates whether or not the child has a specific learning disability and the basis for making this determination. **Specific documentation of the data used in making this determination is a critical component of the written evaluation** report for children with suspected specific learning disabilities. The specific components that must be addressed are listed under Vermont rule 2362.2.6.



The Identification Process

Steps in the process of identifying children with specific learning disabilities:

1. Classroom teacher initiates contact with BBST leader regarding the student in question.
2. BBST meeting date is set.
3. Pre-referral information is gathered.
4. BBST meets, discusses pre-referral information and develops regular education intervention plan and time line.
5. BBST reconvenes and determines effectiveness of regular education intervention plan. If effective, continue the plan. If ineffective, go to #6.
6. BBST determines that further evaluation is required.
7. Basic Staffing Team meets and develops an evaluation plan using pre-referral information and parental imput.
8. Initial consent for evaluation is received.
9. Evaluation conducted.
10. Basic STaffing Team meets to:
    - consider exclusionary criteria:
    - interpret standardized test qualitatively to determine if there are indicators of specific learning disabilities.
    - examine discrepancy score calculations for indicators of measurement errors; and
    - consolidate information and make determination regarding eligibility.
11. Evaluation report written.
12. Notice of IEP meeting sent.
13. IEP developed.
14. Consent for placement obtained.
15. IEP implemented.
16. IEP annual review.

Three Year Re-evaluation:

In the reevaluation process under Vermont rules, continued eligibility is determined by

(a) receiving a comprehensive evaluation,
(b) meeting one or more of the eligibility standards (2362.1), and
(c) being in need of special education.

Due to the effectiveness of special education intervention with a learning disabled student over a three year period, a severe discrepancy may no longer exist. However, performance may still be discrepant, but not severe. The learning disabled student would then no longer be eligible under 2362.1(1)(b). However, if after reviewing all the evaluation data the Basic Staffing Team feels that the student is still in need of special education, the team should consider eligibility under paragraph 2, documenting why regular education alone cannot provide the type of instruction required to meet the pupil's needs.

Alternatives for Ineligible, Low Achieving Children

Some children who have been referred for comprehensive evaluation may not be eligible for or in need of a special education program, but such children still need additional help. This section suggests strategies for school personnel to use in providing follow-through services to concerned teachers and to low achieving children.

Communicating Results:

When a referred child has been evaluated and the IEP team determines that a special education program is not needed, the information gathered as a result of the comprehensive evaluation should be communicated to the BBST.

Communications may occur in any or all of the following ways:

1. Written evaluation report
2. Written reports of individual team members (e.g., school psychologist or speech/language therapist)
3. Oral presentation/discussion of written evaluation report results
4. Summary (written or oral) of IEP meetings

Review Problems:

Once the BBST has received information regarding the outcome of the comprehensive evaluation and the IEP team meeting, the members may wish to determine whether the child is continuing to exhibit educational problems. Generally, children referred for comprehensive evaluations and subsequently determined not to be eligible for special education continue to demonstrate problems in school.

Such problems can often be resolved. Solutions might include **modified teaching strategies or more realistic expectations in the regular classroom, additional support at home, or changing factors affecting the learning environment of the child.** The regular classroom teacher who initiated the original referral for comprehensive evaluation and the parent(s) are sources for the instructional assistance team to consult when making a determination about whether educational concerns continue to be present.

If the BEST determines that a child who is ineligible for special education placement continues to exhibit school difficulties, alternatives

to special placement might be pursued. Options to consider include:

1. referral to remedial and/or Chapter 1
2. change of classroom assignment
3. modifications such as those described in the appendix(G)

Monitoring Alternatives:

The BBST is urged to examine the characteristics of children who are not eligible for special education programs and to collect data about successful alternatives to special education. Such alternatives might be used in subsequent cases for other children whose educational problems are similar.

Many students who are found ineligible for special education continue to exhibit learning difficulties. These students share a similar pattern of characteristics such as below average intelligence, a significant lag in academic skills, and mild perceptual or motor delays. Many ineligible, low achieving children are often working up to their capacity. However, teachers may have a tendency to refer such children for comprehensive evaluation repeatedly unless they are apprised of previous findings and given assistance in making appropriate modifications.

Summary

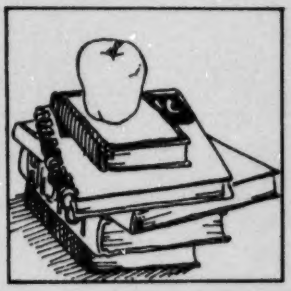
These Vermont guidelines for the identification of students with specific learning disabilities have been developed to assist the special educator in answering the many and varied questions which arise in the identification process.

Special emphasis has been given to the pre-referral and BBST process in an effort to promote the philosophy that **the student with learning problems is the responsibility of the total educational system.** The strategies and interventions suggested at the pre-referral process that are implemented in the classroom will benefit all students, not just those experiencing difficulty.

Full implementation of these guidelines by school personnel can improve educational services to both handicapped and nonhandicapped students. The following mechanisms provided in these guidelines will facilitate quality delivery of both regular and special education services:

1. an effective pre-referral system that will enhance the appropriateness of referrals;
2. the establishment of Building Based Support Teams that will provide a system of support to classroom teachers with children who are experiencing learning difficulties;
3. a learner characteristics checklist that will assist the Basic Staffing Team in the identification of SLD children;
4. a clarification of the exclusionary criteria outlined in the Vermont and federal rules;
5. points to consider when assessing ability/ achievement and in determining severe discrepancy; and
6. a description of alternatives to special education for ineligible, low achieving children.

Appendices



A. Elementary Classroom Teacher Referral Form
B. Intermediate/Secondary Referral Form
C. Classroom Observation Form
D. School Record Review
E. Textbook Analysis
F. SLD Learner Characteristics Checklist
G. Accommodations for the Learning Disabled Student in the Classroom
H. Regular Education Intervention Plan
I. Checklist Summary Sheet

Appendix A
Classroom Teacher Referral for BBST

Student _____ D.O.B. _____ Age _____

Grade _____ Retained yes/no grade _____

Classroom Teacher _____

Reason for concern _____

1. **Strategies.**

Are there any particular strategies you have already used with this student? If yes, briefly describe and indicate their effectiveness.

2. **Classroom Schedule.** Briefly list your daily schedule.

A.M. _____ P.M. _____

3. **Classroom Structure.**

a. **Teaching style** — briefly describe the way you teach; i.e., structured, unstructured, etc.

b. **Classroom layout** — briefly describe how your classroom is laid out.

c. **Behavior management** — describe how you manage behavior in your classroom.

d. **Oral vs. written work** — What is the approximate percentage required in your class?

_____ oral _____ written

4. **Curriculum.**

Does your classroom program reflect your school's curriculum for your grade?

_____

_____

List the text used:

Reading _____

Math _____

Language Arts _____

Spelling _____

Science/Social Studies _____

5. **Student Information.**

a. Has the student demonstrated that he/she has the vocabulary to understand your directions? yes/no If no, give examples of difficulties.

_____

_____

_____

b. Has the student experienced difficulty with the vocabulary of content area work? no/yes If yes, provide examples.

_____

_____

_____

c. In your opinion, is this child's language ability equal to that of his classmates? If no, please give examples of areas of difficulty; e.g., understanding what is said, expressing himself/herself.

_____

_____

_____

d. Have you observed any ways in which this student has learned to compensate for his/her learning difficulties? If yes, please explain.

_____

_____

_____

_____

_____

_____

e. Does this student have difficulties with study skills; e.g., completing homework, notetaking, test taking skills? yes/no If yes, please explain

_____

_____

_____

f. Does the student exhibit difficulty in reading, i.e., word attack skills, literal and/or interpretive comprehension skills?

_____

_____

_____

_____

g. In the area of mathematics, does the student exhibit difficulty with calculations or problem solving?

_____

_____

_____

h. In written expression, does the student exhibit difficulty with spelling, punctuation, writing in complete sentences, organizing a paragraph?

_____

_____

_____

i. Compare this student's behavior with that of his classmates.

_____

_____

_____

j. Would you describe this student as a self-starter or as one who needs a lot of direction and supervision to accurately complete tasks?

_____

_____

_____

k. In which setting does this student function best?

Large group _____ Small _____ One to one _____

l. In your opinion, what is this student's best learning modality?

_____ auditory _____ visual _____ auditory & visual _____ multi-sensory

m. Check the appropriate description of this student's peer relations.

_____ well-liked by all _____ has a small group of friends _____ is a loner_____

6. **Please attach a sample(s) of the student's written work that reflects your area of concern about him/her.**

Appendix B

Course Description

(To be approved by Classroom Teacher)

Course Title _____ Department _____ Grade _____ Teacher _____

Textbook Title/Author _____ Reading Level _____

General goal of course: _____

How & where can we contact you? _____

Please mark ✓ for sources used and an x for sources used most frequently.

INFORMATION INPUT

(Instructional Methods)

INFORMATION SOURCES

_____ TEXTBOOK
_____ WORKSHEETS
_____ LECTURE
_____ DISCUSSION
_____ A-V MATERIAL
_____ AUDIO TAPE
_____ CONCRETE EXPERIENCE
_____ OBSERVATION
OTHER:

STRUCTURE

_____ DIRECTED
_____ INDEPENDENT
_____ PEER TUTOR
_____ 1-1 ADULT
_____ SMALL GROUP
_____ LARGE GROUP/CLASS
OTHER:

INFORMATION OUTPUT

(Types of Assignments)

TEST FORMAT

_____ SHORT ANSWER
_____ ESSAY
_____ MULTIPLE CHOICE
_____ TRUE-FALSE
_____ MATCHING
_____ COMPUTATION
_____ WORD PROBLEMS/MATH
OTHER:

ASSIGNMENTS

_____ WORKSHEETS
_____ SHORT PAPERS
_____ TERM PAPERS
_____ DEMO/LAB PROJECTS
_____ ART, MEDIA PROJECTS
_____ ORAL REPORTS
_____ GROUP DISCUSSION
_____ COMPUTATION
_____ WORD PROBLEMS/MATH
_____ MAPS, CHARTS, GRAPHS
OTHER:

Grading Criteria: _____

_____

_____

_____

_____

Extra Credit: _____

_____

_____

_____

OTHER CLASS REQUIREMENTS

(check only high priority requirements)

ACADEMIC SKILLS NEEDED

	*
_____ Becoming interested	1
_____ Getting Started	1
_____ Paying attention to the spoken word	2
_____ Paying attention to the printed word	2
_____ Following directions	3
_____ Keeping track materials, assignments	3
_____ Staying on task	4
_____ Completing tasks on time	4
_____ Working in groups	5
_____ Working independently	5
_____ Learning by listening	6
_____ Expressing him/herself verbally	7
_____ Reading textbooks	8
_____ Reading study sheet or tests	8
_____ Understanding what is read	9
_____ Writing legibly	10
_____ Expressing him/herself in writing	11
_____ Spelling	12
_____ Seeing relationships	13
_____ Understanding cause and effect; anticipating consequences	13
_____ Drawing conclusions/making inferences	14
_____ Remembering	14

*(page numbers refer to the manual Maladies and Remedies)

BEHAVIOR SKILLS NEEDED

	*
_____ Getting started	3
_____ Coming to class on time	1
_____ Coming to class prepared	2
_____ Following directions	4
_____ Staying in seat	6
_____ Staying on task	5
_____ Completing task on time	7
_____ Working in groups	7
_____ Working independently	8
_____ Demands much help or attention	8
_____ Participating in class discussion	9
_____ Daydreaming	10
_____ Interrupting or talking in class	11
_____ Verbally disrespectful	12
_____ Uses inappropriate language	12
_____ Harasses other students	13
_____ Abuses property	14
_____ Cheating	15
_____ Gets set up by other kids	16

*(page numbers refer to the manual Beyond Coping: Managing Problematic Behavior)

OTHER ACADEMIC SKILLS NEEDED

_____ Notetaking
_____ Outlining
_____ Punctuation
_____ Sentences
_____ Paragraphs
_____ Dictionary use
_____ Independent research
_____ Measuring (to_____)
_____ Manual dexterity

OTHER BEHAVIOR SKILLS NEEDED:

_____ Understands/follows safety rules
_____ Asks questions or for help when needed

ATTENDANCE POLICY: _____

OTHER PREREQUISITES _____

HOMEWORK POLICY _____

MAKE-UP WORK POLICY _____

OTHER CLASSROOM RULES _____

Appendix B
Student Inventory

Student _____ Certification _____ Date _____

School _____ Grade_____ Resource Room Teacher _____

Basic achievement levels: Reading _____ Math _____
Level Source Date Level Source Date

Resource room support needed: extensive _____ moderate _____ occasional _____

STRENGTHS + WEAKNESSES 0 CANNOT DO — CROSS OUT ITEM

INFORMATION INPUT
(How Student Learns)

INFORMATION SOURCES

_____ TEXTBOOK
_____ WORKSHEETS
_____ LECTURE
_____ DISCUSSION
_____ A-V MATERIAL
_____ AUDIO TAPE
_____ CONCRETE EXPERIENCE
_____ OBSERVATION
OTHER:

STRUCTURE

_____ DIRECTED
_____ INDEPENDENT
_____ PEER TUTOR
_____ 1-1 ADULT
_____ SMALL GROUP
_____ LARGE GROUP/CLASS
OTHER:

INFORMATION OUTPUT
(How Student Responds)

TEST FORMAT

_____ SHORT ANSWER
_____ ESSAY
_____ MULTIPLE CHOICE
_____ TRUE-FALSE
_____ MATCHING
_____ COMPUTATION
_____ WORD PROBLEMS/MATH

OTHER:

ASSIGNMENTS

_____ WORKSHEETS
_____ SHORT PAPERS
_____ TERM PAPERS
_____ DEMO/LAB PROJECTS
_____ ART, MEDIA PROJECTS
_____ ORAL REPORTS
_____ GROUP DISCUSSION
_____ COMPUTATION
_____ WORD PROBLEMS/MATH
_____ MAPS, CHARTS, GRAPHS
OTHER:

SUGGESTIONS: _____

I.E.P.C. GOALS _____

Problem Checklist

(check only confirmed and repeating problems in the mainstream)

LEARNING PROBLEMS

		*
_____	Becoming interested	1
_____	Getting Started	1
_____	Paying attention to the spoken word	2
_____	Paying attention to the printed word	2
_____	Following directions	3
_____	Keeping track materials, assignments	3
_____	Staying on task	4
_____	Completing tasks on time	4
_____	Working in groups	5
_____	Working independently	5
_____	Learning by listening	6
_____	Expressing him/herself verbally	7
_____	Reading textbooks	8
_____	Reading study sheet or tests	8
_____	Understanding what is read	9
_____	Writing legibly	10
_____	Expressing him/herself in writing	11
_____	Spelling	12
_____	Seeing relationships	13
_____	Understanding cause and effect; anticipating consequences	13
_____	Drawing conclusions/making inferences	14
_____	Remembering	14

*(page numbers refer to the manual Maladies and Remedies)

BEHAVIOR PROBLEMS

		*
_____	Getting started	3
_____	Coming to class on time	1
_____	Coming to class prepared	2
_____	Following directions	4
_____	Staying in seat	6
_____	Staying on task	5
_____	Completing task on time	7
_____	Working in groups	7
_____	Working independently	8
_____	Demands much help or attention	8
_____	Participating in class discussion	9
_____	Daydreaming	10
_____	Interrupting or talking in class	11
_____	Verbally disrespectful	12
_____	Uses inappropriate language	12
_____	Harasses other students	13
_____	Abuses property	14
_____	Cheating	15
_____	Gets set up by other kids	16

*(page numbers refer to the manual Beyond Coping: Managing Problematic Behavior)

OTHER ACADEMIC SKILLS NEEDED

_____ Notetaking
_____ Outlining
_____ Punctuation
_____ Sentences
_____ Paragraphs
_____ Dictionary use
_____ Independent research
_____ Measuring (to_____)
_____ Manual dexterity

OTHER BEHAVIOR SKILLS NEEDED:

_____ Understands/follows safety rules
_____ Asks questions or for help when needed

STUDENT LIKES (interests and hobbies:)_____

_____

STUDENT DISLIKES: _____

_____

Is the home amenable to helping with student's program? _____ **Yes** _____ **No**

Comments and suggestions: _____

_____

_____

_____

Appendix C
Classroom Observation

Student: _____ Observer: _____

Grade: _____ Observation Ended: _____

Teacher: _____ Observation Began: _____

Date: _____ Total Observation: _____

Area(s) of suspected disability: _____

_____

Subject observed: _____

Total teacher instructional time: _____

Total student independent work time: _____

I. **Classroom Environment:**

Type & level of noise: _____

Pupil/teacher ratio: _____

Type of classroom (open/regular): _____

Availability of space: _____

Note any other distracting stimuli: _____

II. **Instructional Situation:**

One-to-one instruction _____ Small group _____

Verbal instruction _____ Large group _____

Independent work _____ Manipulatives _____

Pencil paper tasks _____ Multimedia _____

Independent project _____

III. **Student Behavior:** Comment on the student's ability in the following areas:

Ability to get organized and begin work: _____

_____

_____

Ability to attend to and follow through on directions: _____

_____

_____

Ability to stay on task and complete assignment: _____

_____

_____

Interaction with other students: _____

_____

_____

Interaction with teacher: _____

_____

_____

Ability to understand the concepts presented: _____

_____

_____

Ability to work with the written material; i.e., textbook, worksheets, etc.: _____

_____

_____

Response to teacher praise or criticism: _____

_____

Summary:

Comment on student's performance in relation to the area of suspected learning difficulty: _____

_____

_____

_____

_____

_____

_____

Appendix D
School Record Review

Name _____ D.O.B. _____ C.A. _____

Grade _____ Retained yes/no grade _____

2. **Attendance Data**

   a.) **Number of schools attended to date** _____

   b.) **Average number of absences** _____

   c.) **Attended nursery school/preschool** _____

3. **Medical Data**

   Screening

   a.) hearing: date _____ results _____

   b.) vision: date _____ results _____

   c.) List any other significant physical or medical information; i.e., seizures, allergies, medication.

   _____

   _____

4. **Achievement Data**

   Please complete the following from existing educational test data:

Test	Date	Score

   Summary of overall achievements:

   _____

   _____

   _____

5. **Ability Data**

Please list any test which measures the student's ability.

Test	Date	Score

Additional: Please record any other pertinent information noted in the record.

Has the student been previously referred? _____ Yes _____ No

If yes, what action was taken?

Appendix E
Textbook Analysis

Student _____ Test _____

Teacher _____ Publisher _____

Grade _____ Level _____

Date _____ Readability Level _____

The following are questions to be considered when analyzing a student's textbook.

1. **Pace of the Book**

   Consider the following:

   A. On the average, how many new concepts are introduced in each chapter?

   _____

   _____

   B. Is there adequate opportunity to apply and practice concepts presented in the chapter?

   _____

   _____

2. **Format of the Book**

   Consider the following:

   A. What is the average sentence length?

   _____

   _____

   B. Are important words, phrases and concepts highlighted?

   _____

   _____

   C. Are questions interspersed throughout the chapter or do they all come at the end of the chapter?

   _____

   _____

   D. Are cue words or phrases found in the margins of the text?

   _____

   _____

   E. Are visual aids, i.e., pictures, graphs, charts used to illustrate concepts?

   _____

   _____

   F. Is the size of the print unusually small?

   _____

   _____

3. **Language Demands of the Book**

Consider the following:

A. Does the format introduce new vocabulary as the first activity of a new chapter?

B. Are there basic vocabulary concepts that are necessary pre-requisites to working in this text? (See teacher's manual of previous level text).

C. Are written directions given in an easy to understand manner?

D. Do written directions and/or questions require prior student mastery of functional words? i.e., underline, circle, compare, contrast.

E. Does the suggested teacher language found in the teacher manual require prior student mastery of certain concepts and vocabulary words?

F. What are the language skills necessary for the student to use this text?

syntactic construction: _____

idioms: _____

morphemes: _____

Based on information collected to date (teacher referral, teacher interview, classroom observation, record review and the textbook analysis) formulate possible hypotheses regarding the student's language skills as they relate to the language requirements of the textbook.

e.g., Student will have difficulty with this text because it requires knowledge of concepts not yet mastered and it contains complex directions with imbeded clauses which student cannot handle.

Appendix F
Specific Learning Disabilities
Learner Characteristics
Checklist

There is no simple set of traits that characterize children with specific learning disabilities. The common characteristic shared by specific learning disabled students is their difficulty in academic learning and their uneven performance across a variety of tasks. By definition, the common trait of SLD students is a discrepancy between measured ability and achievement.

Several authors (Mercer, Myers, Hamill) have pointed out that many characteristics of learning disabled students are also evident in the non-handicapped population. Therefore, it is important to remember that the frequency, intensity, and duration of these difficulties along with their adverse effect on the acquisition of basic skills are the major criteria that distinguish SLD students from their non-handicapped peers.

This checklist lists the common characteristics of learning disabled students as identified in literature. A particular SLD student will not show all of these characteristics, but he or she will demonstrate a cluster of them. This clustering will invariably illustrate discrepant behaviors and uneven performances across academic areas.

The purpose of this checklist is to assist special educators and regular classroom teachers in identifying students who are suspected to have a specific learning disability and who may need to be referred for a comprehensive evaluation.

Oral Expression:

These students have difficulty using spoken language as an effective means of communication, even though they may comprehend it well.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Speaks in single word statements only.				
2. Speaks in phrases only.				
3. Exhibits word retrieval problems.				
4. Exhibits bizarre patterns of language usage.				
5. Imitates or repeats words incorrectly.				
6. Uses gestures to substitute for words.				
7. Has difficulty relating ideas in sequence.				
8. Has difficulty making self understood by other students.				
9. Contributes to class discussions with off-task comments.				
10. Shows reluctance in describing experiences or telling short stories.				
11. Confuses words (i.e. profane/propane, prescription/subscription).				
12. Substitutes other words for words he/she is having trouble retrieving (circumlocution).				

Written Expression

Written expression deficiencies may involve handwriting problems (i.e. spacing and letter formation, spelling difficulties) and/or any of the difficulties encountered in narrative writing, organization of thoughts, choice of vocabulary, logical conclusions, etc.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Has difficulty holding pencil in correct alignment to paper.				
2. Has difficulty producing written work which is legible, properly spaced, capitalized, punctuated.				
3. Uses extra effort to write.				
4. Misspells words phonetically (ruf for rough).				
5. Misspells high frequency sight words.				
6. Makes spellings unrelated to sounds of words.				
7. Confuses homonyms.				
8. Fails to retain spelling words studied in lists.				
9. Has difficulty expressing a complete thought in a sentence.				
10. Has difficulty expressing a complete thought in a paragraph.				
11. Mixes manuscript and cursive forms.				
12. Uses mature thought units (compound sentences, complex sentences, etc.) but does not apply punctuation, capitalization, grammer rules.				
13. Has difficulty sequencing thoughts in a narrative.				

Basic Reading Skills

Students with these deficiencies usually encounter problems in word analysis and word recognition. Word analysis problems may be evident in recognition of word configurations, visual memory of letter sequences, phonic analysis, and use of context cues.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Avoids reading.				
2. Changes behavior when asked to read silently.				
3. Changes behavior when asked to read orally.				
4. Has difficulty matching letters.				
5. Guesses words from initial letters.				
6. Guesses words from pictorial cues.				
7. Guesses words from context cues.				
8. Has difficulty sounding out vowel correctly.				
9. Has difficulty sounding out consonants correctly.				
10. Has difficulty sounding out words correctly.				
11. Blends sounds incorrectly.				
12. Has difficulty with sight vocabulary.				
13. Skips lines.				
14. Moves head when reading.				
15. Moves lips when reading.				
16. Uses finger to anchor self when reading.				
17. Reads high frequency sight words incorrectly (the, and, but).				
18. Reads word-by-word.				
19. Does not observe small differences between words (plurals, verb-endings, possessives) when reading.				

Reading Comprehension:

Specific comprehension deficits affect literal comprehension, interpretive comprehension or critical comprehension. The SLD student may find if particularly difficult to infer, draw conclusions, or identify the main idea in various written materials. These students frequently are unable to answer questions about material just read.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Has difficulty reading and following directions.				
2. Has difficulty answering questions after reading.				
3. Has difficulty reading and completing math story problems.				
4. Has difficulty understanding main idea of a passage.				
5. Has difficulty understanding subordinate ideas of a passage.				
6. Has difficulty drawing conclusions from a passage.				
7. Has difficulty making inferences from a passage.				
8. Has difficulty recalling sequences of written information.				
9. Has difficulty using content cues to guess at unknown word.				
10. Has difficulty reading independently.				

Listening Comprehension:

Students with deficits in listening comprehension do not comprehend spoken language efficiently.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Asks that statements be repeated.				
2. Often says "what?", "huh", etc.				
3. Confuses the meanings of similar sounding words.				
4. Fails to follow directions given verbally.				
5. Does the opposite of the teacher's instructions.				
6. Has difficulty understanding common vocabulary words.				
7. Has difficulty listening attentively to stories, television shows, records.				
8. Has difficulty locating the direction of sounds.				
9. Answers questions inappropriately.				
10. Confuses direction words (front/back, upon/over).				
11. Confuses time concepts (before/after).				
12. Asks irrelevant questions after hearing a story.				
13. Shows increased difficulty in any of the above areas when classroom noise increases.				

Mathematics Reasoning:

The analysis of various mathematical word problems is difficult for SLD students who have poor reasoning and analysis skills. The sequencing of steps required to solve a problem can be especially confusing.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Has difficulty applying math operations to real life problems.				
2. Has difficulty understanding math concepts such as more/less.				
3. Has difficulty understanding basic time concepts.				
4. Has difficulty using calendar correctly.				
5. Has difficutly naming months of the year.				
6. Has difficulty telling time.				
7. Has difficulty using money terms correctly (penny, dime).				
8. Has difficulty making change correctly.				
9. Has difficulty using basic measurements correctly (inches, feet).				
10. Has difficulty using tables and graphs.				
11. Guesses at answers instead of trying to solve problems.				
12. Has difficulty differentiating between essential and non-essential information in solving problems.				
13. Has difficulty solving problems involving a sequence of steps.				

Mathematics Calculation:

These students have problems with the fundamental operations of addition, subtraction, multiplication, and division, and with rote memorization tasks. They confuse mathematical symbols and fail to grasp number relationships. The SLD student may also reverse or mix numbers and sets of numbers. These students often find it difficult to recall the proper sequences of steps to be followed in performing various mathematical operations.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Has difficulty understanding one-to-one correspondence.				
2. Has difficulty completing addition with one digit numbers.				
3. Has difficulty completing addition with two or more digits.				
4. Has difficulty completing addition and carrying.				
5. Has difficulty completing subtraction with one digit numbers.				
6. Has difficulty completing subtraction with two or more digits.				
7. Has difficulty completing subtraction with borrowing.				
8. Has difficulty completing multiplication with one digit numbers.				
9. Has difficulty completing multiplication with two or more digits.				
10. Confuses operational signs.				
11. Uses fingers for computation.				
12. Reverses numbers.				
13. Has difficulty keeping columns straight.				
14. Has difficulty with place values.				
15. Has difficulty completing problems involving more than one operation.				
16. Has difficulty estimating answers.				
17. Completes problems in his/her head yet unable to put on paper.				

NOTE: Although the next three areas are not specified as performance areas in state or federal regulations, the characteristics listed have been noted in the literature as difficulties that affect the SLD student's acquisition of basic skills.

Attentional Skills:

The SLD student who is distractible may have a short attention span, be unable to filter out irrelevant and inappropriate auditory and visual stimuli, and thereby fail to focus their attention on a specific task.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Fails to "finish".				
2. Appears not to listen.				
3. Seems easily distracted.				
4. Has difficulty concentrating on schoolwork or other tasks requiring sustained attention.				
5. Has difficulty sticking to play activity.				
6. Appears to act before thinking.				
7. Shifts excessively from one activity to another.				
8. Has difficulty organizing work (not due to cognitive impairment).				
9. Frequently calls out in class.				
10. Has difficulty awaiting turn in games.				
11. Runs about or climbs on things excessively.				
12. Has difficulty sitting still or fidgets excessively.				
13. Has difficulty staying seated.				
14. Appears to be always "on the go"; "driven by a motor".				
15. Appears not just "over-active", but haphazard, poorly organized, non-goal directed.				

NOTE: The above characteristics should be overriding, obvious and pervasive. Children from disorganized or chaotic environments may appear to have attention difficulties as well as non-goal directed behavior.

Learning Strategies:

It has become increasingly apparent the SLD students are deficient in general learning strategies (Alley, Warner, Schumaker, 1981; Loper, 1981). They do not use the skills of self-questioning, self-testing, self-monitoring, analyzing and scanning one's repertoire for different and appropriate problem solving approaches.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Is unable to detect errors that he/she makes in composition writing.				
2. Is unable to apply appropriate test taking skills across subject areas; i.e., does not thoroughly read instructions, review the entire test before responding, checking answers, does not recognize "give away" questions, or obvious answers, or chooses an answer that is obviously wrong.				
3. Is unable to use rules specific to mathematics.				
4. Is unable to review materials; i.e., does not re-read assigned materials.				
5. Is unable to summarize information; i.e., cannot identify main points and important facts for a selection in two or three sentences.				
6. Is unable to allot a reasonable amount of study time; i.e., does not use study time appropriately in class.				
7. Is unable to apply questioning skills,asks inappropriate questions to the discussion or content topic, or does not ask questions during the class period.				
8. Is unable to outline — take notes on material-in-class notes are sketchy and much doodling evident.				
9. Is unable to structure materials into a logical sequence — cannot organize two or more sources of information into idea or logic.				

Continued on next page

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
10. Is unable to survey material before studying in depth, does not scan for major points before reading material intensively.				
11. Does not use memory aids (verbal, rehearsal, study guides).				
12. Is unable to organize work space.				

Social Perception:

Learning disabled students often misread social interaction cues for symbols. They may misinterpret body language, facial expression, figures of speech, and overtures for friendship, a trait that can subject them to ridicule from peers. This may lead to inappropriate behavior and emotional control. Some SLD students act impulsively. They may have difficulty transferring social skills they have learned to a different social situation. Social perception deficits are particularly noted as students approach adolescence.

The student	Consistently Presents This Characteristic	Sometimes Presents This Characteristic	Not A Problem	Not Observed
1. Makes inappropriate comments.				
2. Makes inappropriate use of personal space.				
3. Has difficulty in anticipating behavior of others.				
4. Has difficulty in changing behavior problems.				
5. Appears to be inflexible.				
6. Tends towards impulsive decisions or judgements.				
7. Has difficulty comprehending subtle meaning (i.e., jokes, puns).				
8. Has difficulty responding to non-verbal cues, hand gestures, facial expressions, etc.				

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Appendix G
Accommodations for the LD Student in the Classroom

Vocabulary Strategies

1. Define words as simply as possible.
2. Use operational definition; i.e., "what is it used for"; text vocabulary on this basis also.
3. Deal with new vocabulary by relating it to previously learned words and concepts.
4. Have students put vocabulary in their own words.
5. Show language root of word if applicable; e.g., pyrometer — pyro = fire; meter = measuring device.

Environmental Strategies

1. Preferential seating near the front.
2. Provide a study carrel.
3. Arrange seating near a student who can assist with assignment.
4. Classroom change.
5. Keep student's desk free from extraneous material.
6. Allow work to be done in quiet area.

Organizational Strategies

1. Set clear time limit for assignment.
2. Assignments cover only **essential** material.
3. Require assignments to be written down and kept in notebook according to subject.
4. Allow additional time to complete task/test.
5. Have student paraphrase directions for assignment in his/her own words.
6. Follow a daily routine. Let student know ahead when routine will change.

Motivational Strategies

1. Check papers by showing C's for correct.
2. Give immediate reinforcement for correct response.
3. Determine a daily/weekly goal with the student.
4. Help student keep graph/charts of daily/weekly progress.
5. Set up a simple home/school communication system for progress.

Curriculum Strategies

1. Provide simpler materials that reinforce the concept being studied.
2. Provide a study guide.
3. Reduce the required mastery of material to key concepts.
4. Provide opportunities for extra drill and practice.
5. Use a peer tutor.

Reading Strategies

1. Reduce language level
2. Become more concrete, use manipulatives, pictures.
3. Reduce amount of new ideas.
4. Relate to previous experience or something student already knows.
5. Provide study guides.
6. Provide alternate media (filmstrip)
7. Add additional input source, like putting text on tape.
8. Pre-teach; tell students what they will learn.
9. Use a fill-in-the-blank instructional technique (cloze procedure).

Presentation Strategies

1. Give assignments orally and in writing.
2. Change activities to accommodate short attention span.
3. Give directions and information in small units.
4. Use simplified worksheets, especially in math.
5. Use concrete and manipulative objects.
6. Highlight key textbook passages. Use markers to indicate where to stop and start an assignment.
7. Give specific questions to guide their reading.
8. Tape lessons so students can listen.
9. Allow student to have sample or practice test.

Math Strategies

1. Have student verbalize the problem step-by-step to make sure he/she understands each stage.
2. Check to see that the meaning of key symbols is clear (, , +, ; etc.)
3. List steps of a process on study sheet or tape; allow student to refer to it as he/she works.
4. Help the student to group words key according to their meaning, i.e., plus and = +, less than, more than = −.
5. Emphasize the position of numbers and symbols when it is important to computation.
6. Cut concepts into smaller steps than is done in most texts.
7. Allow students with spatial problems time to work out spatial relationships, as in geometry, at their own pace.
8. Turn lined writing paper to a vertical position and write numbers in columns. Helps with place value, keeps problems organized.

Auditory Learner

1. Give oral as well as written directions for assignments.
2. Tape important reading material for students to listen to as they read a passage.
3. Put assignment directions on tape so that students can replay them when needed.
4. Give students oral rather than written tests.
5. Have students read/drill essential information using tape recorder, reciting information into recorder and playing it back.
6. Use published audio tapes with students.
7. Have students read/drill aloud to themselves or to another student.
8. Have another student read important information to LD students.
9. Have students repeat words aloud (or silently) while writing them down on paper to keep from leaving out words or phrases.
10. Have students re-auditorize silently, vocalizing material inside their heads.
11. Have a student close his eyes and try to hear words or information, repeating in order to block out distractions.
12. Utilize a phonics approach in teaching reading.

Visual Learner

1. Have students use flash cards.
2. Have students close their eyes and try to visualize words or information in their heads.
3. Write out on the chalkboard verbal directions and key concepts, ideas.
4. Have students write down notes and memos to themselves concerning important words, concepts, ideas, and assignments.
5. Use films and filmstrips to reinforce classroom instruction.
6. Utilize a sight word approach in teaching reading.

Appendix H

Student: _____ School: _____

Birthdate: _____ Teacher: _____

Regular Education Interventions

The Pre-Referral Committee may select from these options or others to explore regular education alternatives. The effectiveness of regular education interventions will be based on a minimum 4-6 week trial period.

IN THE CLASSROOM

1. Strategies — Materials
- a. match materials and methods to student learning style and ability level
- b. allow additional verbal/written response time
- c. oral rather than written tests shorten assignments
- d. shorten assignments
- e. peer/cross age tutors — parent volunteers
- f. consistent positive reinforcement of behaviors
- g. contracting
- h. other: _____

2. Environment
- a. provide study carrel
- b. locate near teacher's desk
- c. time out — away from group
- d. locate among positive peer models
- e. move from fluorescent to natural light source
- f. other: _____

BEYOND THE CLASSROOM

1. Evaluation by reading/math consultant
2. Change of teacher/course/classroom
3. Retention
4. Modify length of school day
5. Consultations
   - a. principal/assistant
   - b. counselor
   - c. other teachers
   - d. Special Education staff
   - e. parents
   - f. school nurse
   - g. other: _____
6. Community Services
   - a. medical
   - b. psychological
   - c. social
   - d. other: _____

SPECIFIC STRATEGIES DATES AND OUTCOMES

3/9/81 — John will be allowed to complete chapter tests in science orally.

4/5/81 — Successful. In future, when more than multiple choice answers are required, John will dictate his answers into a tape recorder.

3/9/81 — Shorten weekly list of spelling words from 20 fifth grade words to 5 fifth grade and 10 fourth grade words.

4/5/81 — Has not make expected progress.

Pre-referral Committee Recommendations:

- ☐ Attempt additional interventions
- ☐ Adequate interventions attempted
- ☐ Refer to B.S.T.

Date: _____

Appendix I
CHECKLIST SUMMARY SHEET

☐ Initial Evaluation ☐ Reevaluation

Student's Name _____ School _____ Teacher _____

Grade_____ District _____

The following areas of the above-named student have been assessed and considered by this multidisciplinary team and have formed the basis for the determination of the student's eligibility for services for the learning disabled.

1. Student's Ability Level is: _____

2. Student's Achievement Level in specified areas (standard score ranges):
   a. Oral Expression _____
   b. Listening Comprehension _____
   c. Basic Reading Skills _____
   d. Reading Comprehension _____
   e. Mathematical Calculation _____
   f. Mathematical Reasoning _____
   g. Written Expression _____

3. Is there evidence of a severe discrepancy ☐ Yes ☐ No
   In which specific achievement areas (list) _____

4. Can this student be excluded from special education services for the learning disabled due to:

	Yes	No
a. sensory or motor handicap	☐	☐
b. mental retardation	☐	☐
c. emotional disturbance	☐	☐
d. environmental, cultural or economic disadvantage	☐	☐

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